



ACCOUNTING EXAMINING BOARD
Room 121C, 1400 East Washington Avenue, Madison
Contact: Brittany Lewin (608) 266-2112
June 17, 2015

The following agenda describes the issues that the Board plans to consider at the meeting. At the time of the meeting, items may be removed from the agenda. Please consult the meeting minutes for a record of the actions of the Board.

AGENDA

9:00 A.M.

OPEN SESSION – CALL TO ORDER – ROLL CALL

A. Adoption of Agenda

B. Approval of Minutes of February 17, 2015

C. APPEARANCE: Deputy Secretary Jay Risch and Assistant Deputy Secretary Eric Esser

D. Administrative Matters

- 1) Staff Updates

E. Legislative and Administrative Rule Matters – Discussion and Consideration

- 1) Discuss Public Comments Regarding Clearinghouse Rule 15-002 – Wis. Admin. Code ACCY 1-9, Relating to Updating Accounting Practices and Standards
- 2) Update from Legislative Liaisons
- 3) Possible Rulemaking Projects or Legislative Matters

F. Credentialing Matters – Discussion and Consideration

- 1) Peer Review Process Update
- 2) Application Review Process

G. Accounting Examining Board Newsletter – Discussion and Consideration

H. Speaking Engagement(s), Travel, or Public Relation Request(s)

- 1) Report on NASBA Annual Conference for Executive Directors and Board Staff – March 24-26, 2015
- 2) NASBA Eastern Regional Meeting – June 24-26, 2015
- 3) NASBA 108th Annual Meeting – October 25-28, 2015

I. Deliberation on Items Added After Preparation of Agenda:

- 1) Introductions, Announcements and Recognition
- 2) Administrative Updates
- 3) Election of Officers/Liaison Appointments
- 4) Education and Examination Matters
- 5) Credentialing Matters
- 6) Practice Matters
- 7) Legislation/Administrative Rule Matters
- 8) Liaison Reports
- 9) Informational Items
- 10) Disciplinary Matters
- 11) Presentations of Petitions for Summary Suspension
- 12) Presentation of Proposed Stipulations, Final Decisions and Orders
- 13) Presentation of Proposed Decisions
- 14) Presentation of Interim Orders
- 15) Petitions for Re-Hearing
- 16) Petitions for Assessments
- 17) Petitions to Vacate Orders
- 18) Petitions for Designation of Hearing Examiner
- 19) Requests for Disciplinary Proceeding Presentations
- 20) Motions
- 21) Petitions
- 22) Appearances from Requests Received or Renewed
- 23) Speaking Engagement(s), Travel, or Public Relation Request(s)

J. Public Comments

CONVENE TO CLOSED SESSION to deliberate on cases following hearing (s. 19.85(1)(a), Stats.); to consider licensure or certification of individuals (s. 19.85(1)(b), Stats.); to consider closing disciplinary investigations with administrative warnings (ss. 19.85 (1)(b), and 440.205, Stats.); to consider individual histories or disciplinary data (s. 19.85 (1)(f), Stats.); and to confer with legal counsel (s. 19.85(1)(g), Stats.).

K. Deliberation on Monitoring Matters

- 1) Daniel A. Kleinhans – Requesting Full Unrestricted License

L. Deliberation on Proposed Stipulations, Final Decisions and Orders

- 1) 13 ACC 010 – Zetley, Carneol & Stein, SC
- 2) 13 ACC 010 – Louis M. Stein
- 3) 13 ACC 010 – Allan J. Carneol

M. Credentialing Matters

1) Application Reviews

- | | |
|------------------------------|------------------------|
| 1. Baumann, JoAnn | 43. Moles, Michael |
| 2. Baumann, Joshua | 44. Nagy, Peter |
| 3. Beyer Schwartz, Elizabeth | 45. Neuser, Kristina |
| 4. Bleecker, Joshua | 46. Niekamp, Kyle |
| 5. Bloechl, Steven | 47. Otte, Gary |
| 6. Brehmer, Matthew | 48. Otte, Michele |
| 7. Bodilly, Clint | 49. Paitrick, Mary |
| 8. Brien, Diane | 50. Pedretti, Dylan |
| 9. Bruins, Daniel | 51. Pekarske, Anthony |
| 10. Burkholder, Emily | 52. Phelan, Tracy |
| 11. Cmejla, Amber | 53. Poertner, Michael |
| 12. Cook, Charles | 54. Powell, Mary |
| 13. Danielson, Erica | 55. Qualey, Sean |
| 14. Denis, Daniel | 56. Reigel, Jordan |
| 15. Dickson, Wei | 57. Rogers, Jessica |
| 16. Du, Ruixue | 58. Schmocker, Arek |
| 17. Fimreite, Jacob | 59. Schramke, Julie |
| 18. Foy, Carrie | 60. Schubert, Adam |
| 19. Freeman, John | 61. Schultz, Daniel |
| 20. Frohlich, Starr | 62. Seelye, Cindy |
| 21. Gaynor, Robin | 63. Seymour, William |
| 22. Geitner, Matthew | 64. Shah, Sujal |
| 23. Golden, Michael | 65. Smith, Graylin |
| 24. Hahnfeldt, Callen | 66. Smith, Gregory |
| 25. Hansen, Mark | 67. Smith, Hunter |
| 26. Hofkens, Sarah | 68. Stroud Megan |
| 27. Hofmann, Sara | 69. Swindling, Stanley |
| 28. Hrdina, Scott | 70. Taylor, Justin |
| 29. Jablonski, Nicholas | 71. Ten Kley, Reid |
| 30. Jezo, Anamarie | 72. Tesla, Iana |
| 31. Johnson, Sharon | 73. Thode, Michelle |
| 32. Kaul, Joshua | 74. Truong, Ha |
| 33. Knobeck, Tyler | 75. Varia, Nikhil |
| 34. Knuth, Jennifer | 76. Volkman, Ann |
| 35. LeDuc, Alison | 77. Wall, Evan |
| 36. Lindeke, Anna | 78. Wanek, Mark |
| 37. Lohoff, Charles | 79. Weinfurter, Sean |
| 38. Malueg, Brittany | 80. Wilcox, Joseph |
| 39. Martinelli, Timothy | 81. Wilkens, Ashley |
| 40. Mckeown, Joseph | 82. Wojtysiak, Sandra |
| 41. Meicher, David | 83. Zeske, Brittany |
| 42. Meighan, Angela | 84. Zhang, Chi |

2) Applications for Approval of Licensure

- | | |
|-------------------------|---------------------------|
| 1. Adrians, Jacqueline | 47. Koplitz, Connor |
| 2. Ancevic, Dennis | 48. Krueger, Jared |
| 3. Baehman, Alyssa | 49. Lagerstrom, Alexander |
| 4. Baker, Gregory | 50. Lanser, Nathan |
| 5. Bennwitz, Kyle | 51. LaPlante, Amanda |
| 6. Berg, Jasmine | 52. Larsen, Bailey |
| 7. Brey, Lisa | 53. Lee, Ivana |
| 8. Brian, Sara | 54. Liebergen, Abby |
| 9. Bryson, James | 55. Long, Derek |
| 10. Buettner, Elizabeth | 56. Mischler, Kelly |
| 11. Campbell, Justin | 57. Murkley, Amanda |
| 12. Catoe, Rachel | 58. Neill, Tanya |
| 13. Chance, Ryan | 59. O'Brien, Michael |
| 14. Cohen, David | 60. Ohlgart, Theodore |
| 15. Cottingham, Jay | 61. Omer, Lauren |
| 16. Crosswell, Samantha | 62. Oswald, Jason |
| 17. Davis, Sarah | 63. Peters, Briana |
| 18. Debano, David | 64. Povlich, Jason |
| 19. Dejna, Jason | 65. Prentice, Matthew |
| 20. Detert, Kyle | 66. Price, Brandon |
| 21. Dettmann, Samuel | 67. Race, Jason |
| 22. Dorn, Lucas | 68. Rueter, Edward |
| 23. Ebert, Nicholas | 69. Schneider, David |
| 24. Eichelberger, Alex | 70. Schuh, Ryan |
| 25. Epping, Steven | 71. Schweiner, Alexander |
| 26. Fabris, Anthony | 72. Seibel, Nicole |
| 27. Fargen, Patrick | 73. Siegle, Sarah |
| 28. Fellenz, Erica | 74. Southworth, Jordan |
| 29. Gardner, Garrett | 75. Spiess, Kimberly |
| 30. Giombi, Amanda | 76. St. John, Carolyn |
| 31. Goldman, Alexandra | 77. Stamps, Tanya |
| 32. Gonyea, Devan | 78. Steger, Sabrina |
| 33. Gosselin, Tasha | 79. Stephanie, Matthew |
| 34. Hathaway, Jacob | 80. Suchla, Stephanie |
| 35. Haugen, Jeffrey | 81. Tarman, Mary |
| 36. Haut, Justin | 82. Temme, Caitlin |
| 37. Holmes, Nicholas | 83. Theis, Matthew |
| 38. Hustad, Alex | 84. Truesdale, Brian |
| 39. Jacobson, Luke | 85. Vu, Ngan |
| 40. Jaeger, Jessica | 86. Vue, Mai Choua |
| 41. Jeremiason, Brian | 87. Wakai, Danielle |
| 42. Johnson, Sandra | 88. Wang, Yisi |
| 43. Jossart, Benjamin | 89. Witt, Andrew |
| 44. Kaehny, Daniel | 90. Wojnowiak, Ryan |
| 45. Kerr, Joshua | 91. Zainer, Andrew |
| 46. Komisar, Derek | 92. Zipperer, Seth |

N. Case Status Report

O. Report from Department Auditor

P. Deliberation of Items Added After Preparation of the Agenda

- 1) Education and Examination Matters
- 2) Credentialing Matters
- 3) Disciplinary Matters
- 4) Monitoring Matters
- 5) Professional Assistance Procedure (PAP) Matters
- 6) Petitions for Summary Suspensions
- 7) Proposed Stipulations, Final Decisions and Order
- 8) Administrative Warnings
- 9) Proposed Decisions
- 10) Matters Relating to Costs
- 11) Case Closings
- 12) Proposed Interim Orders
- 13) Petitions for Assessments and Evaluations
- 14) Petitions to Vacate Orders
- 15) Remedial Education Cases
- 16) Motions
- 17) Petitions for Re-Hearing
- 18) Appearances from Requests Received or Renewed

Q. Consulting with Legal Counsel

RECONVENE TO OPEN SESSION IMMEDIATELY FOLLOWING CLOSED SESSION

R. Vote on Items Considered or Deliberated Upon in Closed Session, if Voting is Appropriate

S. APPEARANCE: Al Rohmeyer, Division Administrator – Division of Legal Services and Compliance

T. Open Session Items Noticed Above not Completed in the Initial Open Session

ADJOURNMENT

MEETINGS AND HEARINGS ARE OPEN TO THE PUBLIC, AND MAY BE CANCELLED WITHOUT NOTICE. IF A BOARD ADJOURNS TO CLOSED SESSION, RECONVENES IN OPEN SESSION TO VOTE ON ITEMS CONSIDERED IN CLOSED SESSION, AND DURING VOTING DETERMINES THAT ADDITIONAL DELIBERATIONS ARE NECESSARY FOR VOTING, THE BOARD MAY ADJOURN TO CLOSED SESSION TO CONTINUE DELIBERATIONS AND THEN RECONVENE INTO OPEN SESSION FOR VOTING.

Times listed for meeting items are approximate and depend on the length of discussion and voting. All meetings are held at 1400 East Washington Avenue, Madison, Wisconsin, unless otherwise noted. In order to confirm a meeting or to request a complete copy of the board's agenda, please call the listed contact person. The board may also consider materials or items filed after the transmission of this notice. Times listed for the commencement of disciplinary hearings may be changed by the examiner for the convenience of the parties. Interpreters for the hearing impaired provided upon request by contacting the Affirmative Action Officer, 608-266-2112.